

Configure the Microsoft Teams Settings for a Domain

Microsoft Teams is a third-party service that allows organizations to create online conference rooms, hold live meetings, and share video webinars.

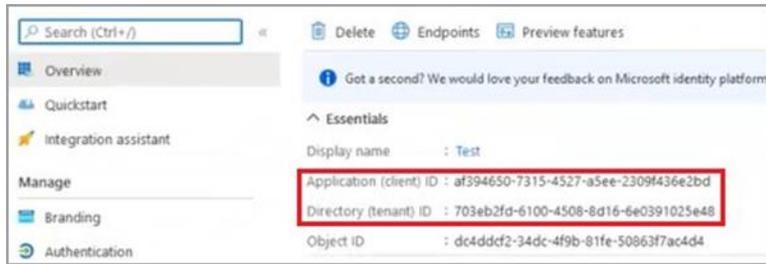
If you have a Microsoft Azure account, you can integrate SumTotal with Microsoft Teams. This allows you to create and schedule live events, assign a responsible instructor as a Teams organizer, and allow learners to launch Teams meetings from within SumTotal Learning Management.

- For more on Microsoft Teams, see <https://support.microsoft.com/en-us/teams>.

Before You Begin

There are prerequisites you need to handle through Microsoft Azure before you can integrate with SumTotal. You can use Microsoft's Help documentation to complete these processes.

- Make sure you have a general understanding of Microsoft Teams live meetings, including basic Teams terminology like organizers, presenters, and lobbies.
- **Create a Microsoft Azure account.** Ensure your company has a Microsoft Azure account with Microsoft Teams permissions. If you don't, you need to create one.
- **Configure instructor (organizer) accounts.** "Organizers" in Microsoft Teams are the same as "responsible instructors" in SumTotal. When an administrator creates a Teams meeting within SumTotal, they'll assign the activity to a responsible instructor. This user must have an active Azure account with a Microsoft 365 license that uses the same email address as their SumTotal account, otherwise they can't be assigned as an instructor (organizer) to the activity.
 1. Create an Azure account with a Microsoft 365 license for every user who will act as an organizer for a Microsoft Teams meeting. When you're creating their accounts, collect their object IDs, as you'll need them in a later process.
 2. Ensure each user has the same primary email address listed in SumTotal and Microsoft Azure. This is the **Email 1** field on their Administrator Profile in SumTotal. The two systems use this email address to "link" the user's organizer and instructor accounts.
- **Create an app through Microsoft Azure for SumTotal.** You should work with an expert in your IT department who has administrative access to Azure to accomplish this.
 1. Log in to Azure.
 2. Click **App Registrations**.
 3. Click **New registration**.
 4. On the **Overview** page, copy the **Application (client) ID** and **Directory (tenant) ID** and paste them into a document. You'll need these later during the integration process.



5. Click **Certificates & secrets** in the left-hand panel.
6. Click **New client secret**.
7. Give the secret a **Description** and set **Expires** to **Never**, then click **Add**.
8. Copy the **App Secret's Value** and paste it into your document. You'll also need this during the integration process.



Note: As soon as you perform another operation or leave this page, Microsoft hides the secret's **Value** and you can't copy it anymore. Make sure you grab it before doing anything else.

9. Click **API permissions** in the left-hand panel.
10. Click **Add a permission** and include the following:
 - **Directory.Read.All**
 - **OnlineMeetings.Read.All**
 - **OnlineMeetings.ReadWrite**
 - **OnlineMeetings.ReadWrite.All**
 - **User.Read**
 - **User.Read.All**

These app permissions allow SumTotal to call to the API to retrieve users based on their e-mail addresses and find, create, or update online meetings.

11. Return to the **Azure** Home page and click **Users**.
12. Grant your organizers (responsible instructors) permission for Microsoft Teams. Remember that all organizers need an active Azure account with a Microsoft 365 license, as documented in the previous section "Configure instructor (organizer) accounts."
 - a) Click the organizer's name.
 - b) Click **Licenses** in the left-hand panel.
 - c) Click the user's Microsoft 365 license.
 - d) For **Microsoft Teams**, click **On** (if it isn't enabled already).

- e) Repeat the above steps for any other organizers. Other attendees and presenters don't need any special licenses or permissions. They don't even need a Microsoft account, since they can enter the meeting as a guest.

- **Configure the Application Access Policy:** This is handled through a script. Again, you should work with an expert in your IT department to perform these steps. Consult the Microsoft Help documentation for assistance: <https://docs.microsoft.com/en-us/graph/cloud-communication-online-meeting-application-access-policy>.

1. For the **Appid**, enter the **Client ID**.
2. For the policy's **Identity**, enter whatever you want to name the policy.
3. For the policy's **Description**, enter descriptive text. For example:

```
New-CsApplicationAccessPolicy -Identity SumTotal-policy -
AppIds "af394650-7315-4527-a5ee-2309f436e2bd" -Description
"SumTotalintegration app"
```

4. Grant app policy access to **every** user who can act as an organizer (or "responsible instructor" in SumTotal). If the user is **not** included here, then they cannot be assigned as a responsible instructor to a Microsoft Teams activity created in SumTotal.

The user's **Identity** is their object ID in Azure. The **PolicyName** is the same as the policy's **Identity** entered in the last step. For example:

```
Grant-CsApplicationAccessPolicy -PolicyName SumTotal-policy -
Identity "653186d5-ade7-4abb-8897-e1fe83aca7dc"
```

- If you need to use Microsoft Teams in multiple domains, you can either:
 - ▶ Configure your Microsoft Teams settings in a parent domain and then select **Inherit parentdomain settings** for all child domains where you want to use it. This process allows the Azure app configurations to work in multiple domains.
 - ▶ If inheriting parent settings isn't an option, you'll need to create a unique Azure app for each domain where Microsoft Teams is enabled and configure the Application Access Policy for each app. Repeat the above steps as many times as needed.

▶ **Configure your Microsoft Teams integration**

Best Practice: To ensure the integration goes smoothly, we recommend working with professional services to help set up your Microsoft Teams integration.

1. In the Header menu, click .
2. Navigate to **Learning Management > Integrations > Virtual Classrooms > Microsoft Teams Settings**.

MICROSOFT TEAMS SETTINGS

Enable Microsoft Teams Activities

Authentication:

Tenant ID:*

Client ID:*

Client Secret:*

API URL:*

3. (Recommended) If you're in a child domain, select **Inherit parent domain settings** to use the same integration settings as the parent domain. Keep in mind that if you later break inheritance with a parent domain, you will lose your connection to your Microsoft Teams account in that child domain.
4. Select **Enable Microsoft Teams Activities** to enable a connection with Microsoft Teams. If you enable Teams and then later disable it, you can't create new Teams activities and your learners can't access any upcoming live events.
5. Enter the Microsoft Teams credentials you collected when building your app.
 - ▶ **Tenant ID:** Enter the **Directory (tenant) ID**.
 - ▶ **Client ID:** Enter the **Application (client) ID**.
 - ▶ **Client Secret:** Enter the **Value** for the **App Secret**.
6. Click **Apply Defaults** to automatically add the default value in the **API URL** field. You do not need to change the value in this field unless specifically told to do so during a troubleshooting session with your SumTotal support representative.
7. Click **Test** to test the connection.
8. Click **OK** to save changes.

Once you've successfully integrated with Microsoft Teams, you're ready to create Microsoft Teams activities in SumTotal.

Note: Microsoft Teams does not support activity creation via the Training Migration Job (TMU).

Create a Microsoft Teams Session

Microsoft Teams is an online, real-time meeting provider where the host or presenter shares multimedia presentations and broadcasts live audio or video to participants. Users can access both live and recorded Teams events as learning activities in SumTotal.

Learners can register for and launch a Microsoft Teams live session from SumTotal the same way they would any other scheduled activity. When they launch the Teams meeting, they have the option to log in to their Teams account (if they have one) or join the meeting as a guest. They can also choose whether to open the meeting through the downloaded Teams app or via the web browser.

Learners will be prompted to mark their completion (Yes or No) after closing the meeting. Users with roster access can adjust the completion details later if needed.

Note: You must be integrated with Microsoft Teams in order to create Teams live sessions.

What would you like to do?

- [Create or edit a live Microsoft Teams live session](#) (below)
- [Upload a Microsoft Teams recording](#) (on page 438)

► *Create or edit a live Microsoft Teams live session*

Before You Begin:

- Make sure you have a general understanding of Microsoft Teams live meetings, including basic Teams terminology like organizers, presenters, and lobbies. If you need a refresher course, see the Microsoft Teams Help documentation: <https://support.microsoft.com/en-us/teams>.
- Ensure that the user you want to assign as the meeting's responsible instructor has an active Microsoft Azure account that (1) has the appropriate licenses and permissions and (2) uses the same email address as their SumTotal account. If you're not sure, check with your system administrator.

1. In the Header menu, click .
2. Navigate to **Learning Management > Activity Management > Learning Activities**.
3. Create a **New Activity > Virtual Session** or **Edit** an existing one.
4. If the activity is in Production, **Send to Stage**. Keep in mind that, because this activity was in production previously, you can update the activity's **Name** and **Start** and **End date and time** until the activity begins (based on the previously set **Start time**). After that, the activity is "locked" and you can't change these properties.
5. Enter or update any general properties, such as the activity's **Name**.
6. Click **Optional**.
7. Under **Schedule**, click **General**.

- a) Choose the **Start date and time**.

Note: When setting the start time, please note that the **Start** button is not visible to learners until the time set in the **Pre-schedule launch activation duration** field of the domain's **Basic Settings: Online Content** section.

If this field is set to zero (0), we recommend setting the activity start time to 30 minutes before the actual start of the event so users can see the **Start** button before the assigned starting time.

- b) Choose the **End date and time**.
c) Select the **Time zone** from SumTotal's list of supported options.
d) Click **OK**.

8. Under **Resources**, select **Instructors** and [assign the instructor](#) (on page 690).

- ▶ Microsoft Teams designates the **Responsible** instructor as the event's organizer. You can only choose one responsible instructor.
- ▶ You can assign multiple **Qualified** instructors if desired, but doing so does not grant them any special privileges. If your company has configured designated presenters within Teams, it might be useful to assign those presenters as qualified instructors. Otherwise, there's no reason to assign additional instructors.

Note: Assigned instructors will have the activity automatically added to their SumTotal calendars, but not their Microsoft Teams calendars. They'll need to add the activity to their Teams calendar manually.

9. Under **Web Based Training**, click **General**.

10. If the **Launch method** is not filled in, set it to **Microsoft Teams**.

11. (Mobile users only) Select **User can launch or register from the Mobile app** if you want users to be able to access the live session from the SumTotal Mobile app. When users launch the activity, they will be prompted to download the Microsoft Teams app if they haven't done so already.

- ▶ For more on working with mobile activities, see the *SumTotal Mobile User Guide*.

12. Click **Microsoft Teams** and update the properties as needed.

These items will be disabled if the launch method is not set to Microsoft Teams.

General > Quick Asses... > Redirect Set... > Multi Langu... > **Microsoft T...**

Manage the Microsoft Teams activity properties. Please note that these settings will be overridden if your company's meeting policy in Microsoft Teams is more restrictive.

Users who can present

Select the participants who get marked as presenters when they join the meeting. Presenters can share content and manage other participants.

Everyone
 Everyone in the organizer's organization
 Only the organizer
 Only designated presenters (as configured in Microsoft Teams)

Users who can bypass the lobby

Select the participants who can go directly to the meeting. Any users not selected must wait in the lobby until a presenter admits them.

Everyone
 Everyone in the organizer's organization
 Only the organizer
 Everyone in either the organizer's organization or a trusted organization (as configured in Microsoft Teams)

The properties on this page also exist within Microsoft Teams itself. Your company's Teams settings are automatically selected, but you can update them if needed.

However, if you update the settings to be **less** restrictive than the settings configured in Microsoft Teams, the activity will ignore your selections and use the Teams settings instead. For example, if your company's Teams setting is "Everyone in the organizer's organization can present," then you could update the setting to "Only the organizer," but you could **not** update it to "Everyone" (because this is less restrictive).

Tip: Remember that the "organizer" is the responsible instructor you assigned in a previous step.

- a) Choose the **Users who can present**. This determines which users will automatically get marked as presenters when they join the meeting. A presenter can share content and manage other participants.
- **Everyone**
 - **Everyone in the organizer's organization.** This setting refers to the organizer's organization in Microsoft Teams, **not** their SumTotal organization(s).
 - **Only the organizer**
 - **Only designated presenters (as configured in Microsoft Teams).** See the Microsoft Teams help documentation for instructions on configuring designated presenters.

- b) Choose the **Users who can bypass the lobby**. This determines which users will automatically enter the meeting's "room" when they launch the activity. Any users not selected must wait in the lobby until a presenter admits them.
- **Everyone**
 - **Everyone in the organizer's organization**. This setting refers to the organizer's organization in Microsoft Teams, **not** their SumTotal organization(s).
 - **Only the organizer**
 - **Everyone in either the organizer's organization or a trusted organization (as configured in Microsoft Teams)**. This setting refers to Teams organizations, **not** SumTotal organizations. See the Microsoft Teams help documentation for instructions on configuring trusted organizations.

Tip: Microsoft Teams recordings are not automatically added to SumTotal, but you can manually upload them as learning activities. See [Upload a Microsoft Teams recording](#) (on the next page) for instructions.

13. (Recommended) Ensure that only the learners who need to attend the session can do so. You may need to:
- ▶ Limit the activity to specific users by selecting **Hide from search results for Learners and Managers** on the [Status properties page](#) (on page 554) and then [assigning the activity](#) (on page 710) to the learners who need to attend it.
 - ▶ Set [capacity limits](#) (on page 649) or [allocate](#) (on page 670) a set number of "seats" to certain groups of users. You may also want to [configure a waiting list](#) (on page 731) so if learners try to register after the activity reaches capacity, they can go on a waiting list instead.
 - ▶ Define [registration audiences](#) (on page 662) to limit who can view the activity.
14. Update any additional [properties](#) (on page 530).
15. When you're ready, move the activity to production.

Moving the Microsoft Teams activity to production creates the event in Microsoft Teams. Designated instructors and users with administrative access to the event can update any optional properties from within Microsoft Teams.

However, any changes you make to the meeting's properties from within Microsoft Teams do **not** get shared with SumTotal. To ensure consistency, you should update the property from within SumTotal, not Microsoft Teams.

Tip: If you're testing the Teams integration as the responsible instructor, make sure you're logged in to the organizer account in Microsoft when you launch the live session. If you're logged into your personal Microsoft account, the meeting launches using your account instead of the organizer's and you won't have organizer access.

- For more on working with Microsoft Teams events from within Teams itself, see the Microsoft Teams Help documentation: <https://support.microsoft.com/en-us/teams>.

► **Upload a Microsoft Teams recording**

1. In the Header menu, click .
2. Navigate to **Learning Management > Activity Management > Learning Activities**.
3. Click **File Upload** and upload the Microsoft Teams MP4 file with a **Launch method** of "GenericDocument."
4. When the file finishes uploading, click **Next**.
5. Update all relevant activity **Properties** and complete the [file upload workflow](#) (on page 345) the same way you would any other file. When you're ready, move the activity to production.